

Work Assignment Form. (WebForms v1.0)

Work Assignment Statement of Work

Title: Support for EPA's State and Local Climate and Energy Program

Contractor: IEc, Inc.

Contract No.: EP-D-14-031

Work Assignment Number: 2-05

Estimated Period of Performance: October 1, 2017 to September 30, 2017

Estimated Level of Effort:

Work Assignment COR (WA COR):

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Contract Level COR:

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Background and Purpose:

The mission of EPA's Climate Protection Partnerships Division (CPPD) is to reduce emissions of greenhouse gases (GHGs) that contribute to global warming. To accomplish this goal, CPPD manages a variety of programs that build partnerships with private and public organizations to promote greater use of energy-efficient technologies and clean energy strategies. These programs deliver the technical information and tools organizations and consumers need to choose energy-efficient solutions and best management practices.

The State and Local Branch (SLB) within CPPD runs the State and Local Climate and Energy Program. This program provides technical assistance, analytical tools, and peer exchange opportunities to help state, local, and tribal governments use energy efficiency (EE), renewable energy (RE), and other strategies to reduce GHG emissions and achieve

multiple environmental, human health, energy system and economic benefits. SLB coordinates with EPA's Regional Offices to ensure the program's resources are designed to meet target audience needs, reflect the current state of best practices, are effectively disseminated, and help further broader EPA goals. The purpose of this work assignment is to assist SLB and relevant EPA regional staff with the planning, development, and facilitation of a series of regional training workshops on EE/RE opportunities for low-income communities. The Contractor shall complete work (i.e. prep, facilitation, and follow up) associated with the first workshop, started under the previous work assignment (WA 1-11), and then support 1-2 additional workshops.

Tasks and Deliverables:

The WA COR will review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the WA COR's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 0 - Prepare Workplan

Within 15 calendar days of receipt of the WA signed by the Contracting Officer, the contractor shall convene a kick-off call with SLB and EPA regional staff, as appropriate, to discuss the key objectives and deliverables of the WA. Subsequently, the contractor shall develop and submit a workplan that outlines, describes, and includes: the technical approach, resources, timeline, and due dates for deliverables; a detailed cost estimate by task; and a staffing plan. The WA COR and the Contract Level COR and the CO will review the workplan. However, only the CO can approve/disapprove the workplan. The Contract Level COR is authorized to suggest revisions via email. If the Contract Level COR does request revisions, then the revisions shall be submitted as requested. The contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

- 0a.** Kick-off call within 15 calendar days of receipt of WA.
- 0b.** Workplan within 15 calendar days of receipt of WA.
- 0c.** Revised workplan within 10 calendar days of receipt of comments from the Contracting Officer, if required.

Task 1 - Workshop Planning, On-site Facilitation, and Follow-up Support

Utilizing sections (f)(viii), (f)(ix), (f)(x), and (f)(xi) of the Statement of Work, the Contractor shall provide technical, organizational, logistical, audio/visual, meeting

facilitation, administrative, and background and follow up materials development support for a series of regional training workshops (2-3) on EE/RE opportunities for low-income communities. The series shall be designed around a standard format and agenda that can be tailored to meet the specific needs and interests of different communities so that workshops can be held in multiple EPA Regions. Work on these standard elements of the series and planning for the first workshop in the series was initiated under WA 1-11. Under this new work assignment, the Contractor shall complete the work started under WA 1-11 (including the first workshop) and then support 1-2 additional workshops.

As part of the planning activities, the Contractor shall continue to work with SLB and relevant EPA regional staff to help refine the target audience/participants, scope, objectives, and desired outcomes of the workshop series. The Contractor shall then use these decisions to update and finalize the draft concept paper (3-5 pages), which SLB will use for outreach on the workshop series to other EPA staff and external stakeholders. Additional planning support shall include: creating and tailoring the agenda for each workshop location; developing workshop invitations, relevant background materials, handouts, and marketing materials; identifying, scheduling, and prepping expert speakers/trainers; managing participant registration; coordinating with the meeting location and facilities; organizing side events, such as participant site visits or group dinners; and other related workshop logistics as determined by the COR.

The Contractor shall also provide on-site facilitation for each workshop. Facilitation activities shall include: coordinating room and A/V set up with meeting facilities; managing participant check in; transitioning between sessions and expert speakers/trainers; leading group discussions and activities; identifying themes and gaps in discussions; summarizing key points; balancing attendee participation in discussions; note taking/record-keeping; and other workshop implementation activities as determined by the COR.

The Contractor shall also provide post-meeting follow-up support. Follow-up activities shall, at a minimum, include drafting and finalizing workshop summary reports. Additional follow-up activities may include: analyses of particular needs and issues identified during the workshop discussions, the creation of outreach materials based on workshop outcomes and lessons learned, and/or the development of recommendations for next steps by EPA. The Contractor shall provide all final products in electronic format.

Deliverables and schedule under Task 1

Specific deadlines for deliverables will be on a case by case basis set by the COR.

- 1a.** Final concept paper on workshop series.
- 1b.** Draft and final agenda for each workshop.
- 1c.** Draft and final participant materials/handouts for each workshop.
- 1d.** On-site facilitation for 2-3 workshops.
- 1e.** Draft and final summary reports for each workshop.
- 1f.** Additional Draft and final follow up products, as requested by the COR.